



Growing with QuickBooks Live Bookkeeping

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Speakers



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Agenda

What is QuickBooks Live?

How does QuickBooks Live help me, my practice, my firm?

What is it like to be a QuickBooks Live Bookkeeper?

Q & A



**SMALL BUSINESS
WANT TO FOCUS ON THEIR BUSINESS,
NOT THEIR BOOKS**

Why QuickBooks Live

Our customers tell us they need assistance managing their books.

7 out of 10 of all small business are **not connected** to an accounting professional for ongoing accounting support

6 out of 10 are **already connected** to an accounting professional on QuickBooks Online

1 out of 4 of new customers who abandon or cancel cite “**Did not know how to get started**” as top reason

*Small Businesses don't feel confident they're doing the right thing,
nor do they have the time to dedicate to do it well*

While many small businesses using **QuickBooks Online** are connected to ProAdvisors through our **Find-a-ProAdvisor** platform, our research shows that:

40% of small businesses don't work with a ProAdvisor or accounting professional

89% of small businesses say they're more successful when working with an accounting professional

QuickBooks Live aims to bridge that gap by providing small businesses with the bookkeeping expertise they need to thrive

What is included with QuickBooks Live

Customize their setup

Categorize and reconcile transactions

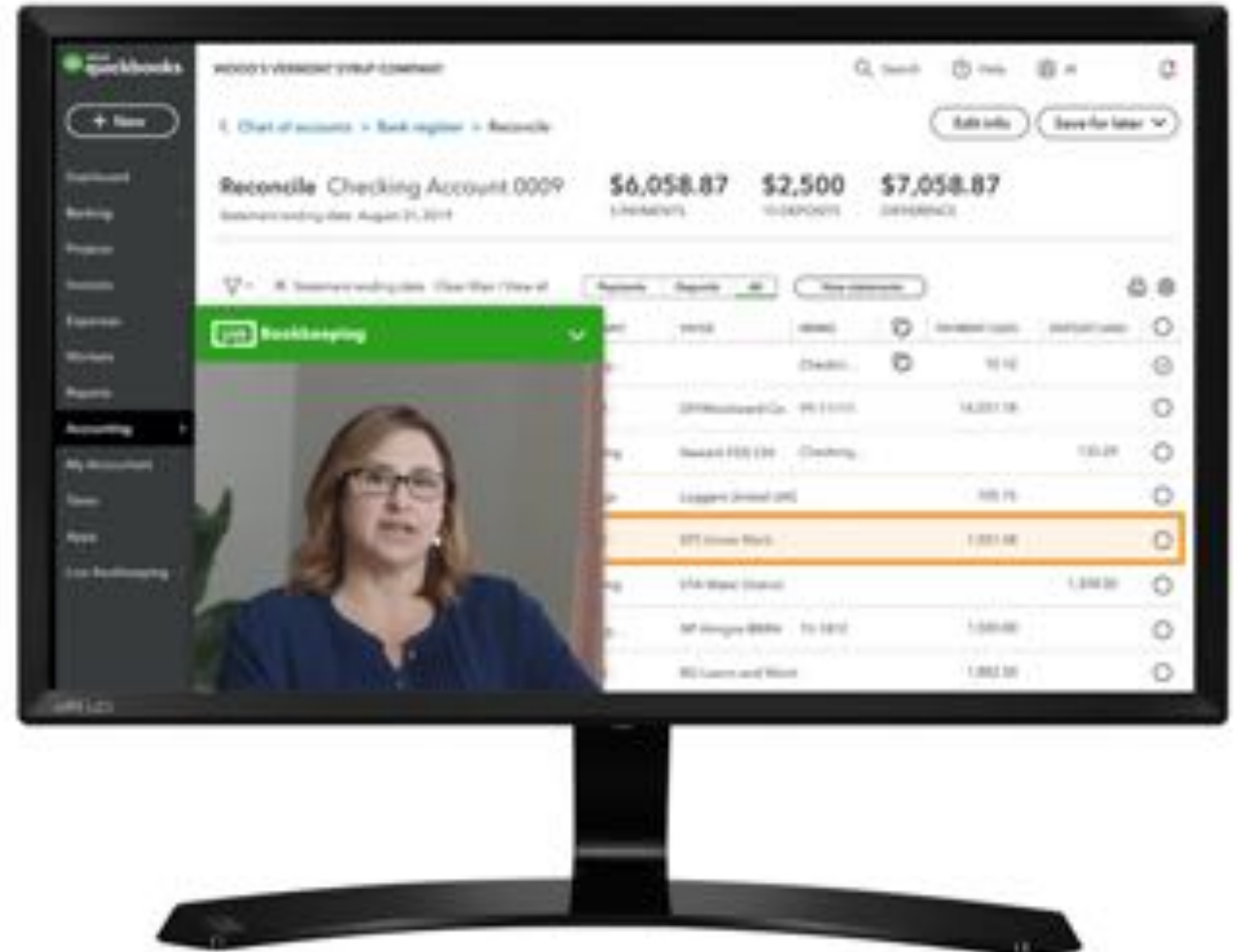
On demand assistance

Help ensure their books are accurate at month end

Teach workflows

Personalized monthly reports

Be ready for tax time



A woman with long dreadlocks is standing in front of a chain-link fence. She is wearing a black t-shirt with white text that reads "love without reason". The background shows a brick building behind the fence.

Freedom

**FREEDOM TO
FOCUS ON THEIR
BUSINESS**

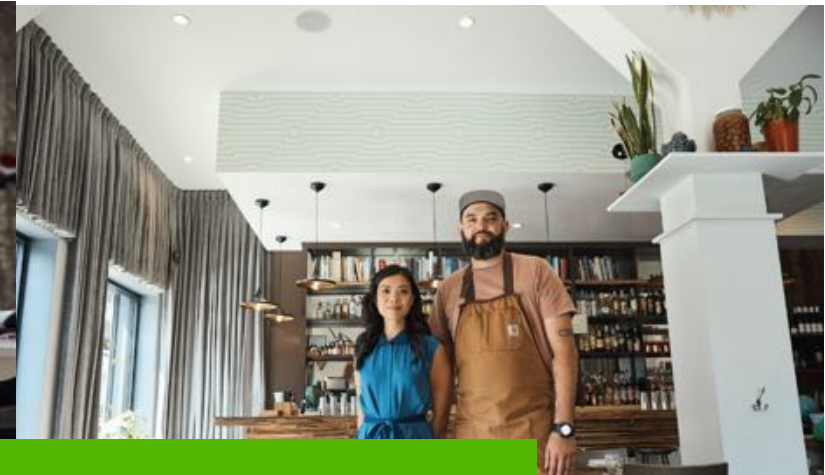
LaRayia
Lunch On Me



Confidence

**CONFIDENCE THAT
THEIR BOOKS ARE
ACCURATE**

Steve Gold
ElectricOn



QUICKBOOKS LIVE HELPS SMALL BUSINESSES MAKE SMART FINANCIAL DECISIONS





How does QuickBooks Live help me,
my practice, my firm?



Working as a QuickBooks Live Bookkeeper

Make extra money

Work from home

Set your own schedule



Growing your practice as a QuickBooks Live Bookkeeper

Expand your network

Develop your skills and industry expertise

Learn new technology




How QuickBooks Live can help larger firms

Free up capacity for advisory services

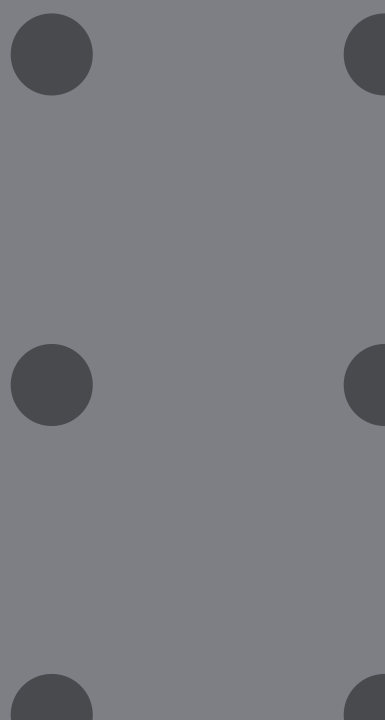
Hire ahead of demand

Expose early career talent to training and broader industry knowledge





What is it like to be a QuickBooks Live Bookkeeper?



Qualifications

ALL of the following:

- Active QuickBooks Online ProAdvisor certification
- 1 or more years experience working with QuickBooks Online
- Proficient with technology
- Strong customer service skills
- Ability to work independently in a fast-paced environment

and ONE of the following:

- Active CPA credential (Certified Public Accountant)
- Active CPB credential (Certified Public Bookkeeper)
- Bachelor's degree
- 3+ years managing the books for a Small Business



Identifying top talent at all levels

Qualifications



**Associate
Bookkeeper**



**Senior
Associate
Bookkeeper**



**Expert
Bookkeeper**



**Senior Expert
Bookkeeper**

Growing with QuickBooks Live



Expert

Serve our customers and grow your expertise



Lead

Support our experts and develop your leadership skills

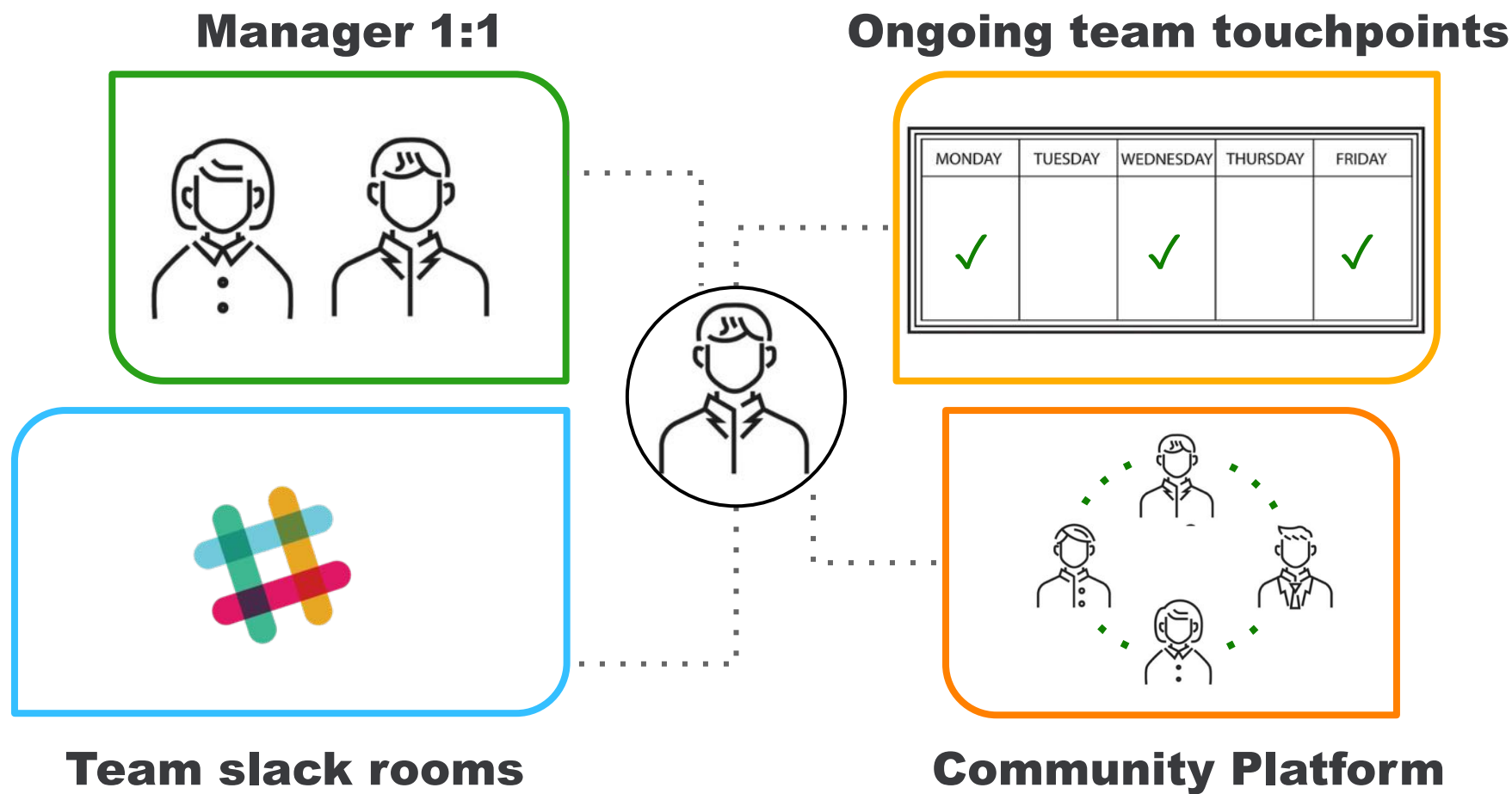


Manager

Lead a team and shape our service

Getting connected

Though remote, our bookkeepers are connected into the larger expert network



Working on QuickBooks Live

The Role:

Part-time (20-30 hours week)

Year-round work

A fixed schedule that fits your life, with hours between 6am and 6pm PST Monday through Friday

Benefits:

401k enrollment with a match by Intuit

Employee stock purchase plan (ESPP)

Employee Assistance Program

Bonus incentives





Q&A time!

What do our Bookkeepers say?



“I've been a bookkeeper and an accountant for twenty five years but there are things that I don't know. And having the ability to reach out to anyone in our network to ask the questions I need to make certain that my small business receives the best service possible has been an amazing resource.” - *Dayna, 25 years of bookkeeping experience*



“Well we have a really flexible schedule; you can work from 6:00 a.m. to 6:00 p.m. (PST). We work all across the country and you can pick your times that work best for you and you can also work with your small businesses to find a schedule that works for both of you. So it's really flexible and it works well for everyone involved.” - *Kiva, 20 years of bookkeeping experience*

“Joining QuickBooks Live has definitely impacted my business in a huge way. I've been able to serve small business owners all over the United States. I'm not locked geographically to the small business owners in my area.” - *Jon, 3 years of bookkeeping experience*



Session summary

What is QuickBooks Live?

Ongoing, monthly bookkeeping service delivered in QuickBooks Online via a team of remote US-based Certified ProAdvisors

How does QuickBooks Live help me, my practice, my firm?

- Earn extra money
- Work from home during hours you set
- Learn from a network of professionals about new industries, bookkeeping best practices, and new technologies

What is it like to be a QuickBooks Live Bookkeeper?

Part-time role where I get to practice my bookkeeping craft while enjoying the benefits and stability of working in a large public company

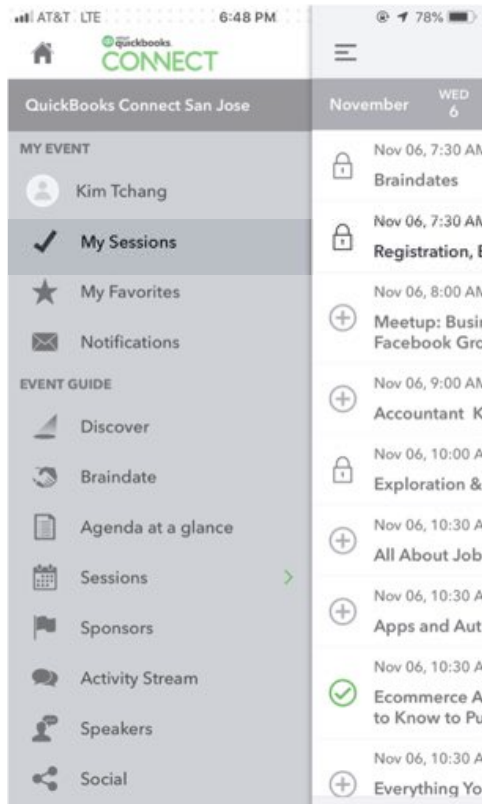
What's next

- 1 Have specific Questions:**
Come talk to us after the session
- 2 Attend another session to learn more:**
Day in the Life of a QuickBooks Live Bookkeeper
- 3 Get QuickBooks ProAdvisor Certified**
Friday 8AM - 2PM
- 4 Ready to join?**
Come to the booth- Match with a recruiter for onsite screening

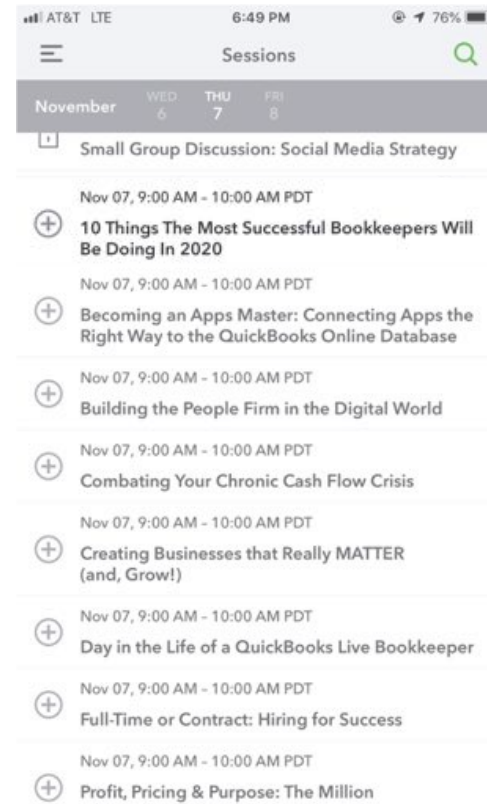
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Provide feedback to help us design content for future events

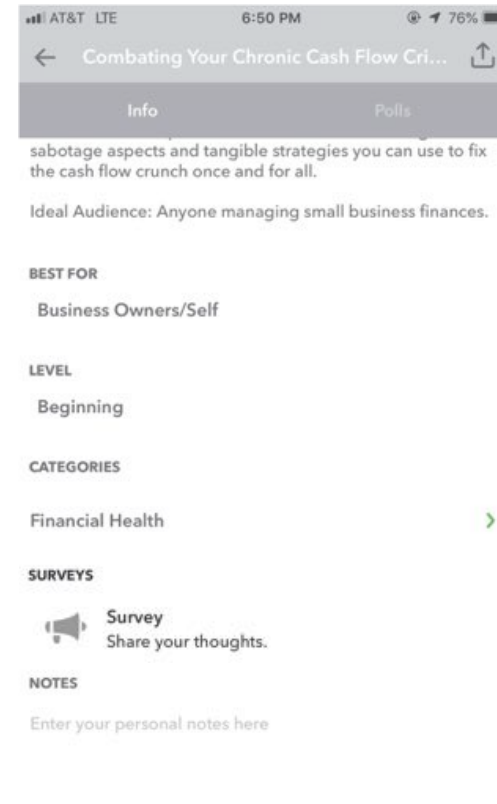
1. Select Sessions



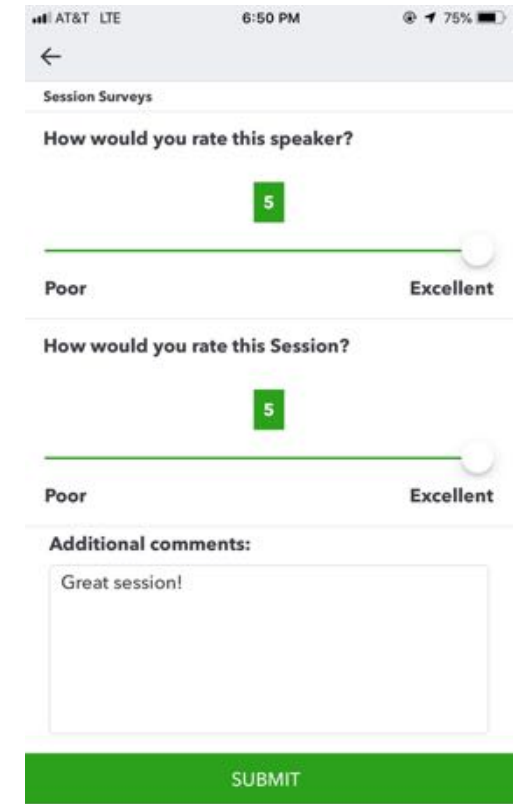
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. Below the header, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is also present. A paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is provided. Below the search bar are filter buttons: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list shows sessions for November 7:

Time	Session Title	Action
7:30-7:00 am	Registration, Breakfast & Exploration	
7:30-10:30 am	Braindates New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. Learn more Best for: All Audiences CPE Hours: not eligible	✕
8:00-8:30 am	Yoga	+
8:00-8:45 am	Breakout Sessions	
	Small Business Meetup: Relationship Marketing and the Power of Human Connection	+
	Small Group Discussion: Social Media Strategy	+
	Small Group Discussion: Showing up - Why What You Wear Matters	+
	Small Group Discussion: Build Your Dream Bookkeeping firm	+



OWN
THE
FUTURE